

**Probate Committee
Judicial Conference of Indiana**

February 19, 2010
Minutes

1. Members present. The following members of the Committee were present: David Bolk, Robert Freese, Daniel Burke, Thomas Milligan, James Redwine (by phone), Perry Shipman, Kathy Smith (by phone) and Susan Orr Henderson, Chair.
2. Staff present. Michelle C. Goodman provided the Committee with staff assistance.
3. Guests. Vicki Davis, Indiana Judicial Center, and Dr. Jenuwine, Notre Dame.
4. Approval of minutes. The Committee approved the minutes from the December 2009 meeting.
5. Judicial Education Session. The Committee was asked to develop a Guardianship 101 session for the Spring Judicial College in April. The Committee, along with Ms. Davis and Dr. Jenuwine, outlined the topics for the session to include: jurisdiction issues, administration issues, pro se issues, and record keeping issues. The topics were assigned approximate time frame and Ms. Davis requested all session materials be submitted by April 1.
6. Innovations in Probate. Judge Henderson reported that the Guardianship Task Force is still meeting and there will be a spring symposium. She also indicated that they were working with Dr. Jenuwine on a report that can be submitted back to the Chief Justice on this topic.
7. State Bar Probate Section. There were no new materials from the State Bar section, but the Committee briefly discussed the legislation on volunteer advocates.
8. Probate Deskbook. The Committee reviewed draft changes to the following sections requested at the December meeting: 4.01 (H), 4.02(C), 4.03(A)(5), 4.05(A), 4.06(F-4), 4.06(F-6), and 8.10 (B). The Committee adopted the change to 4.01(H), 4.02(C), and 4.06 (F-4 & F-6). The Committee made slight amendments to 4.05(A) and 8.10(B). The Committee held section 4.03. The Committee also reviewed 9.00 Powers of Attorney, 1.01 on Probate, Wills, and Will Contest, and 1.40 Inventory and Asset Management. The Committee plans to review the following sections at the April meeting: 1.20 Unsupervised Estates, 1.30 Personal Representatives, 1.70 Inheritance Taxes, 1.80 Wrongful Death. The members responsible for the remaining sections will be sent a submission deadline via email for future meetings.
9. Future meetings. The remaining 2010 meeting schedule is:

Friday, April 23, 2010 at 10 a.m.

Friday, June 4, 2010 at 10 a.m.

Friday, August 6, 2010 at 10 a.m.

Friday, November 5, 2010 at 1:30 p.m.

All meetings will be held at the Indiana Judicial Center.

Respectfully submitted,

Michelle C. Goodman
Staff Attorney